CITY OF FRESNO
PEOPLESOFT END-USER TRAINING

TIME AND LABOR V.8.3 COURSE MANUAL

NOVEMBER 2006

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Time &Labor v.8.3 Training Outline

Time and Labor Overview

Time and Labor is the PeopleSoft application used to report time worked and create payable time which is passed to Payroll. Time and Labor reports the type and amount of time, and to determine how the cost of that time is charged to the General Ledger and Projects. Schedules can be assigned individually to employees, or assigned as a default by workgroup. Employee's task assignment (fund/org/project information) is assigned by default, and can be modified to reflect an employee's various activities.

The process to report time for employees begins with assigning schedules to employees. This schedule can be the default from the workgroup if the employee's schedule is eight hours per day, Monday through Friday. If the employee has a non-default schedule, that schedule is assigned individually. The next step in the process is to report time for employees, either individually or collectively by group. There are several methods of reporting time. The best option will be determined by the time and task reporting needs of the department.

Time Administration is the process that converts reported time into payable time. Time Administration runs edit checks and rules on reported time, and creates payable time and exceptions. Exceptions are reviewed and corrected, and the time is approved to pass to payroll.

A process is initiated by payroll to consolidate and load Time and Labor information onto the pay sheets along with additional pay information that is part of employee's pay profile. The payroll is confirmed, direct deposit file is transmitted, and checks printed for distribution to employees.

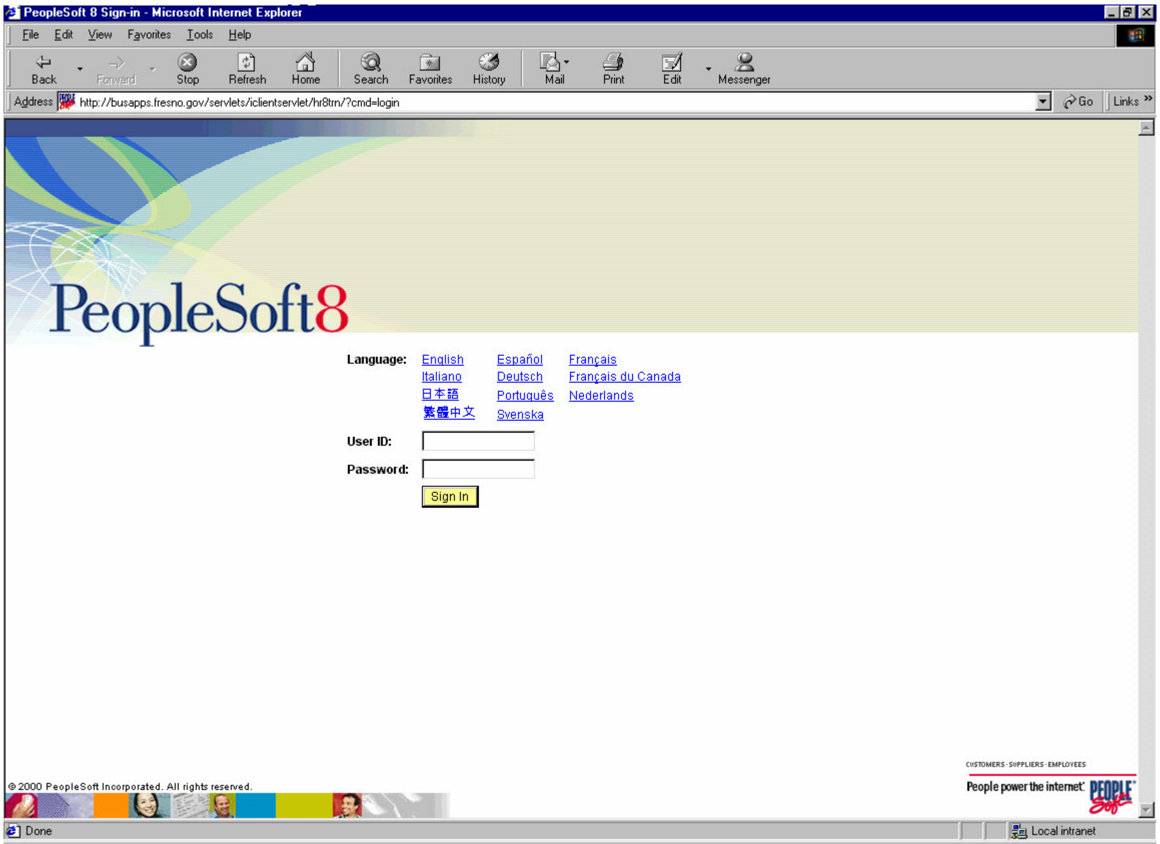
Changes to Time and Labor in release 8.3

The newest release of PeopleSoft Time and Labor is a significant change from our current version, but the basic concepts of scheduling, creating and reporting time and exceptions remain the same. There is a new look to the pages and processes, but they will still seem familiar, and their use should be intuitive.

The most obvious change is from a Windows-based format to a Web-based format. The impact of this change is minimal from an end-user perspective, but provides a stronger back end interface with outside applications. There are other significant changes in the Time and Labor Update to Payroll process, but, again, those changes should have minimal impact on the end user.

PeopleSoft 8.3 uses an internet browser format to move from page to page, with a menu structure that is similar to PS 7.51. Users will click a link from a menu to advance to the desired functional page. Each page in PeopleSoft displays a header with the path taken through the menus to reach that page. Users can return to any intermediate page by clicking the link from the breadcrumb trail.

The sign-on screen is reached by entering the URL in Internet Explorer. You will probably want to store this site as a favorite in Internet Explorer on your terminal.

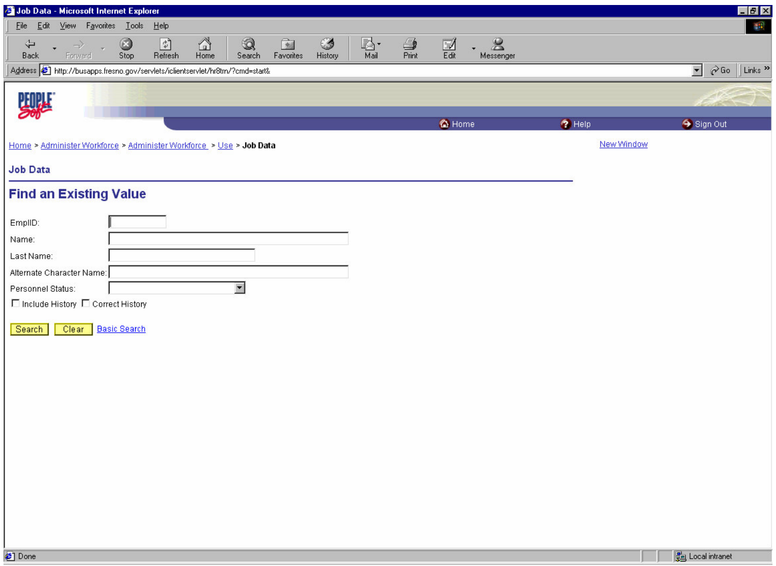


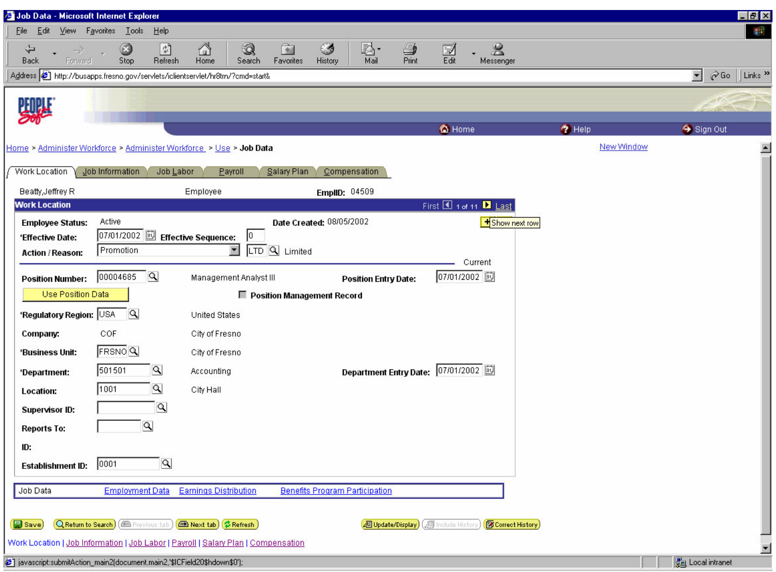
Just as you can create favorites that jump to selected internet sites, PS users can bookmark pages as favorites and, using the Internet Explorer Favorites, skip directly to that page from any other page in PS

PeopleSoft provides search buttons for fields that have list of valid options (employee id, time reporting code, project id, etc). Within each page, valid options for individual fields will be displayed by clicking on the looking glass icon. The appropriate level of functional and row level security in PeopleSoft (what you can do, who you can see) is determined by your job responsibilities and your department/division.

Job Data

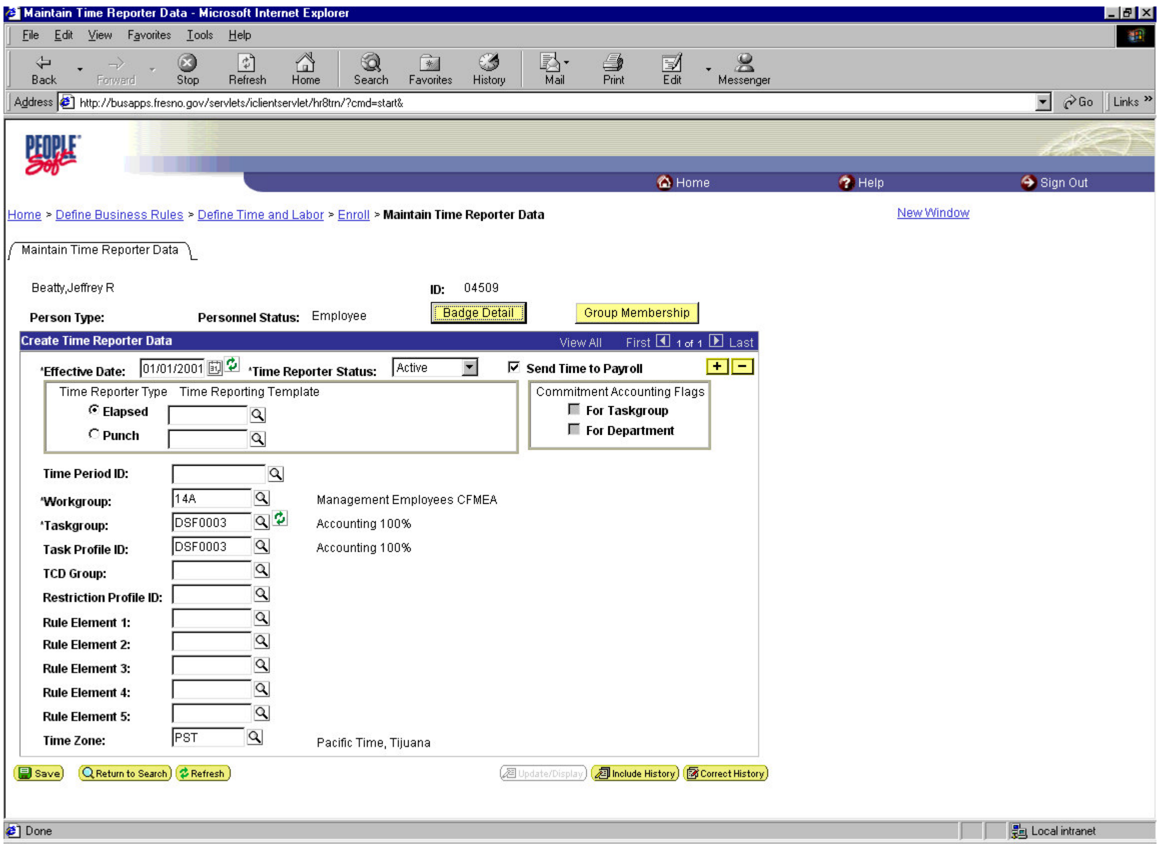
The page for Job information is reached by selecting Administer Workforce > Administer Workforce > Use > Job Data. Additional panels can be reached either by clicking on the tab at the top of the page, or clicking the link at the bottom of the page.





Time and Labor employee setup

The employee Time and Labor setup remains similar in PS 8.3 – each employee belongs to a Workgroup which defines their benefits and work rules, and a Taskgroup which defines the default for how their time is charged to the budget and project costing. Both the Workgroup and Taskgroup are assigned to the employees on the Maintain Time Reporter Data page



Time Reporter Template

New in T&L 8.3 is the Time Reporter Template, which allows definition of a template of fields that are available for reporting time. By managing the Time Reporter Template assigned to an employee and the Task Profile Template assigned to the Employee's Task Group, time reporting panels can be customized as needed. Data fields can be included or omitted based on the needs of the department – when time is reported for each employee, the template displays the selected fields for input. If no Time Reporter Template is defined for an employee, then the time reporter template defined for the employee's taskgroup applies.

Schedule Templates

In addition to a default schedule that is defined for each workgroup, each employee can have a distinct default schedule. This schedule is attached to the employee on the Assign Work Schedule page. Navigate to Home > Define Business Rules > Define Time and Labor > Enroll > Assign Work Schedule. This feature of Time and Labor makes it easy to set the schedules in departments with non-traditional work schedules. Employees with the default schedule Monday through Friday, 8 hours/day will automatically be set with the workgroup default schedule. Employees with other schedules will be assigned the appropriate schedule, and effective dated rows can be added as schedules change.


Home > Define Business Rules > Define Time and Labor > Enroll > Assign Work Schedule

Assign Schedules

Jeffrey R Beatty   Empl Rcd#: 0

Schedule Assignments

Details

*Effective Date	Assign Workgroup Schedule	Schedule	Description
06/23/2003	No	4X10 FSASU	4x10 Payperiod F, Sa, Su off
07/01/1999	Yes	REG PAYPER	Regular 2 Wk PayPeriod M-F 5x8

Data entry

There are new panels for time entry, both PeopleSoft delivered and City of Fresno developed panels. These will provide additional flexibility for data entry, and will be covered in detail in this document.

There are two primary T&L data entry methods, Self Service and Rapid Entry. Self Service can be done for individuals or groups, using either the Mass Time functions or the Weekly Elapsed Time functions. Rapid Entry uses the familiar process of creating a session with lines of data that is then loaded into Time and Labor. This manual will cover these processes in detail.

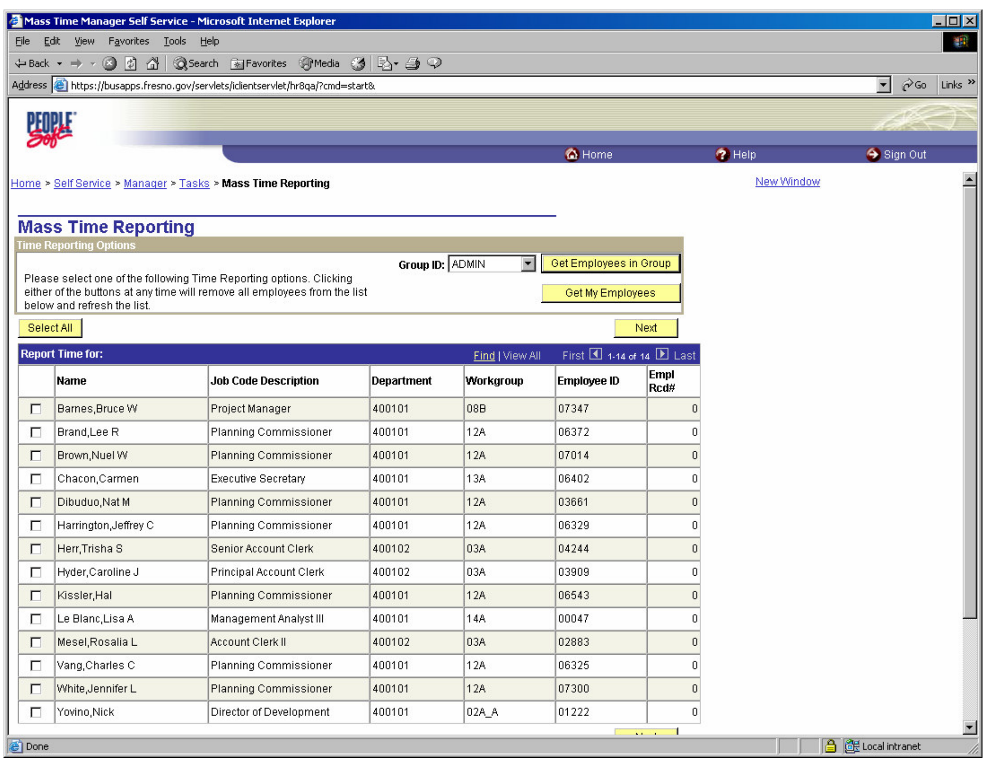
Manager Self Service

The Manager Self Service functions will likely be the most common time entry process. These pages allow access to all employees within a group or division, with the option of reporting time by pay period, by week, or by day. The functions available are Mass Time or Weekly Elapsed Time.

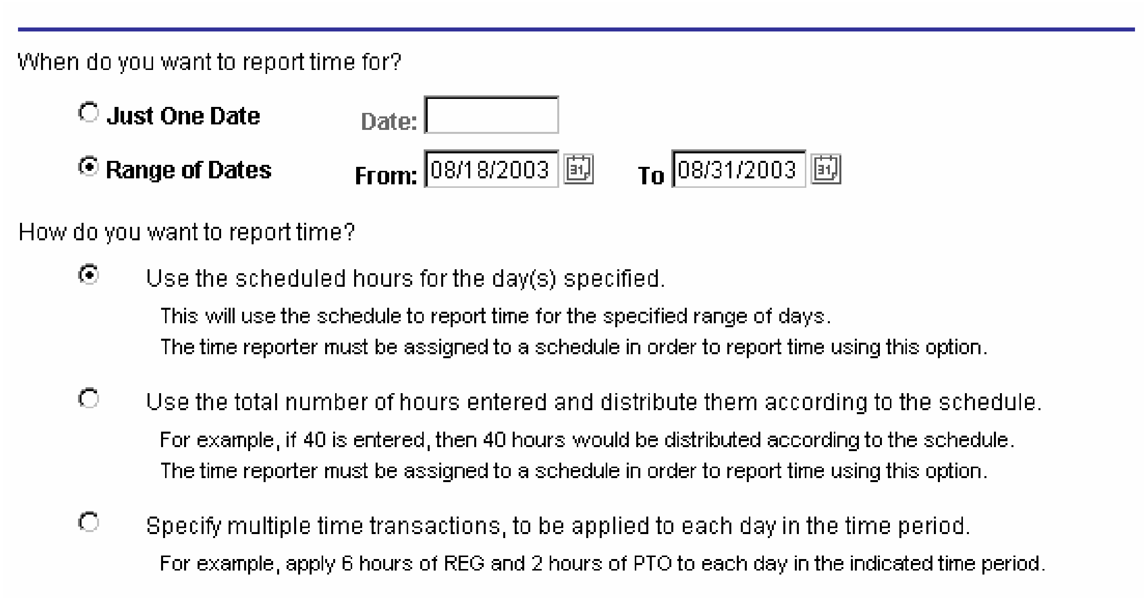
Mass Time

Navigate to: Self Service > Manager > Tasks > Mass Time Reporting
Report by one date or range of dates. The most common use will be to report for a range of dates, using the employee's schedule to report time. The employee's schedule is determined either by the workgroup default, or a schedule specifically assigned to the employee. Mass Time Reporting can also be used to report a pattern of multiple TRCs within a period, or distribute a sum of hours over the period according to the employee's schedule.

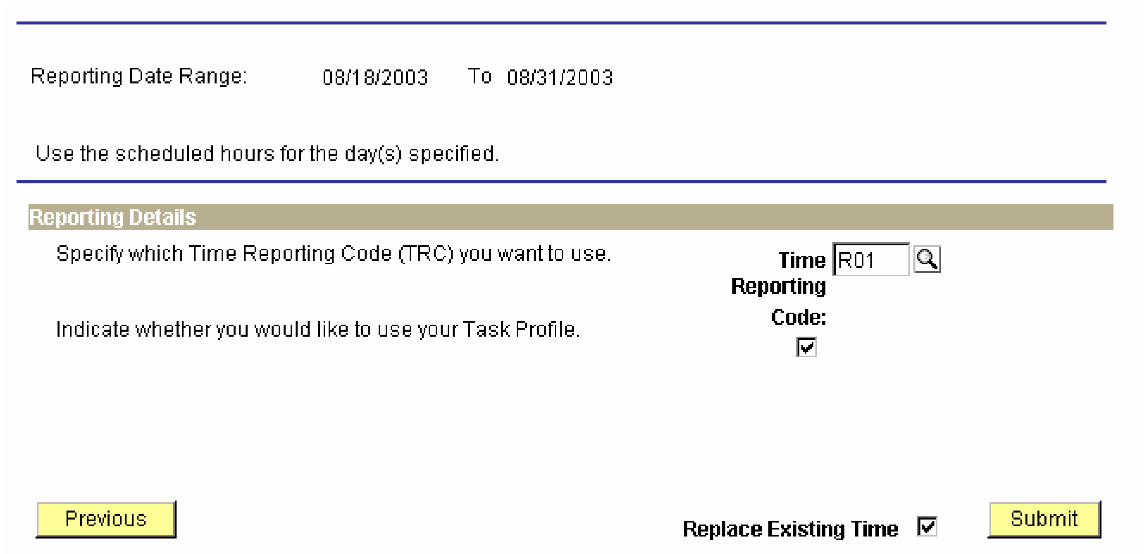
On the first page of the Mass Time Reporting process, select either your T&L group and click 'Get Employees in Group', or click 'Get My Employees' to bring up the employees you want to report time for.   Select the employees to include or exclude by checking the box in the left column. You may select all the employees at once by clicking the 'Select All' button.



The second page requires input for the date or range of dates, and how to report time. Normally, you will want to report time for a pay period (two weeks, Monday through Sunday) according to the employee's schedule.



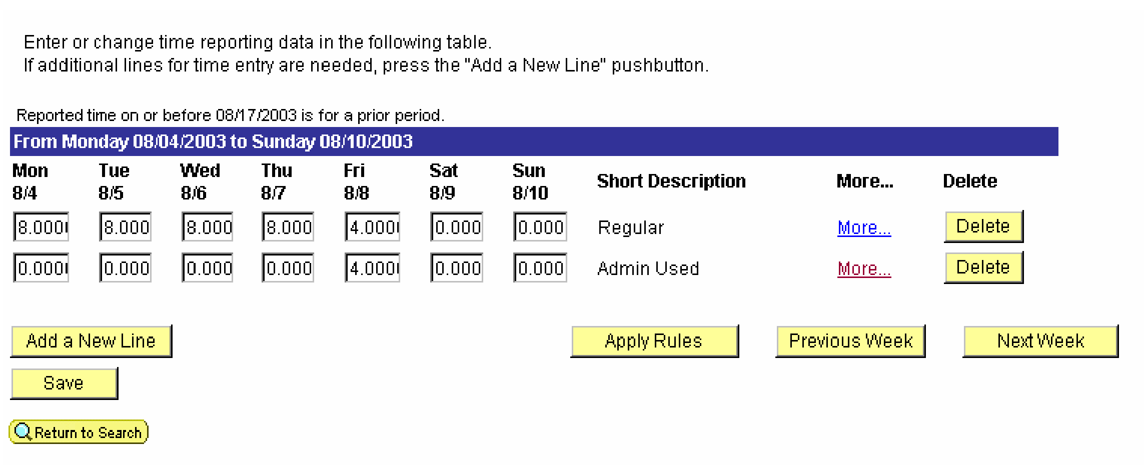
The third page requires input for the TRC used, the Task Profile used, and allows a choice to replace or add to existing time. The Submit button initiates a process that posts time to Time and Labor. Normally, you will want to select the check box to use the default Task Profile, and replace existing time. Exceptions to this would be if the employee's time should be charged to a different account code, or if this page was used to report time that was in addition to the employees regular time (overtime, shift pay, etc).



Weekly Elapsed Time

This time entry page is used to report daily hours for a week at a time.   It will work especially well for temporary employees who do not work a fixed schedule, for posting leave time, or for adding overtime hours to employee's scheduled time.   Navigate to Home > Self Service > Manager > Tasks > Weekly Elapsed Time. The panel will display seven days, beginning with the date input in the search box. It will usually be best to input Monday's date, and display the entire work week from Monday through Sunday.

Each line reports one TRC. If additional TRCs are used during the week, add a new line by clicking the 'Add a New Line' button. If leave hours are posted, remember to reduce the regular hours accordingly.


Enter or change time reporting data in the following table.
If additional lines for time entry are needed, press the "Add a New Line" pushbutton.

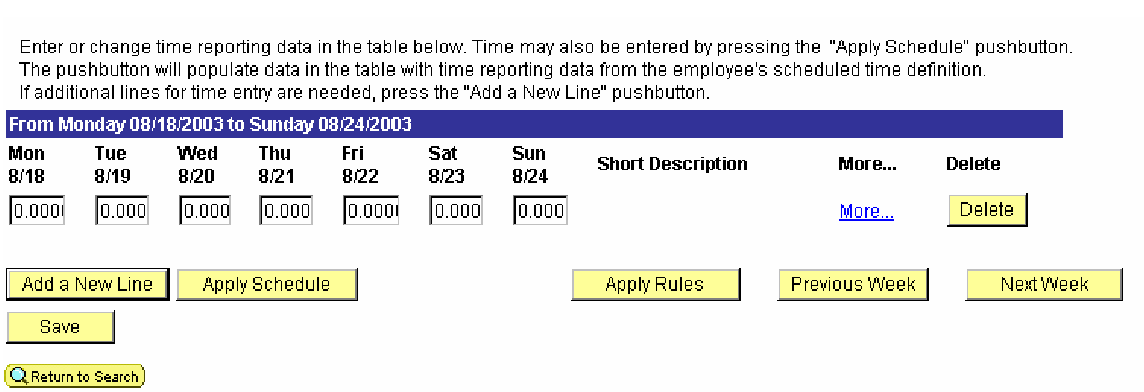
Reported time on or before 08/17/2003 is for a prior period.

From Monday 08/04/2003 to Sunday 08/10/2003

Mon 8/4	Tue 8/5	Wed 8/6	Thu 8/7	Fri 8/8	Sat 8/9	Sun 8/10	Short Description	More...	Delete
8.000	8.000	8.000	8.000	4.000	0.000	0.000	Regular	More...	Delete
0.000	0.000	0.000	0.000	4.000	0.000	0.000	Admin Used	More...	Delete

Add a New Line   Apply Rules   Previous Week   Next Week
Save
Return to Search

It is possible to populate the week according to the employee's schedule by clicking the Apply Schedule button. Rules can be processed on this page by clicking the Apply Rules button. The 'Previous Week' and 'Next Week' buttons allow easy navigation forward and backwards through the calendar. Clicking the Save button posts the time.


Enter or change time reporting data in the table below. Time may also be entered by pressing the "Apply Schedule" pushbutton.
The pushbutton will populate data in the table with time reporting data from the employee's scheduled time definition.
If additional lines for time entry are needed, press the "Add a New Line" pushbutton.

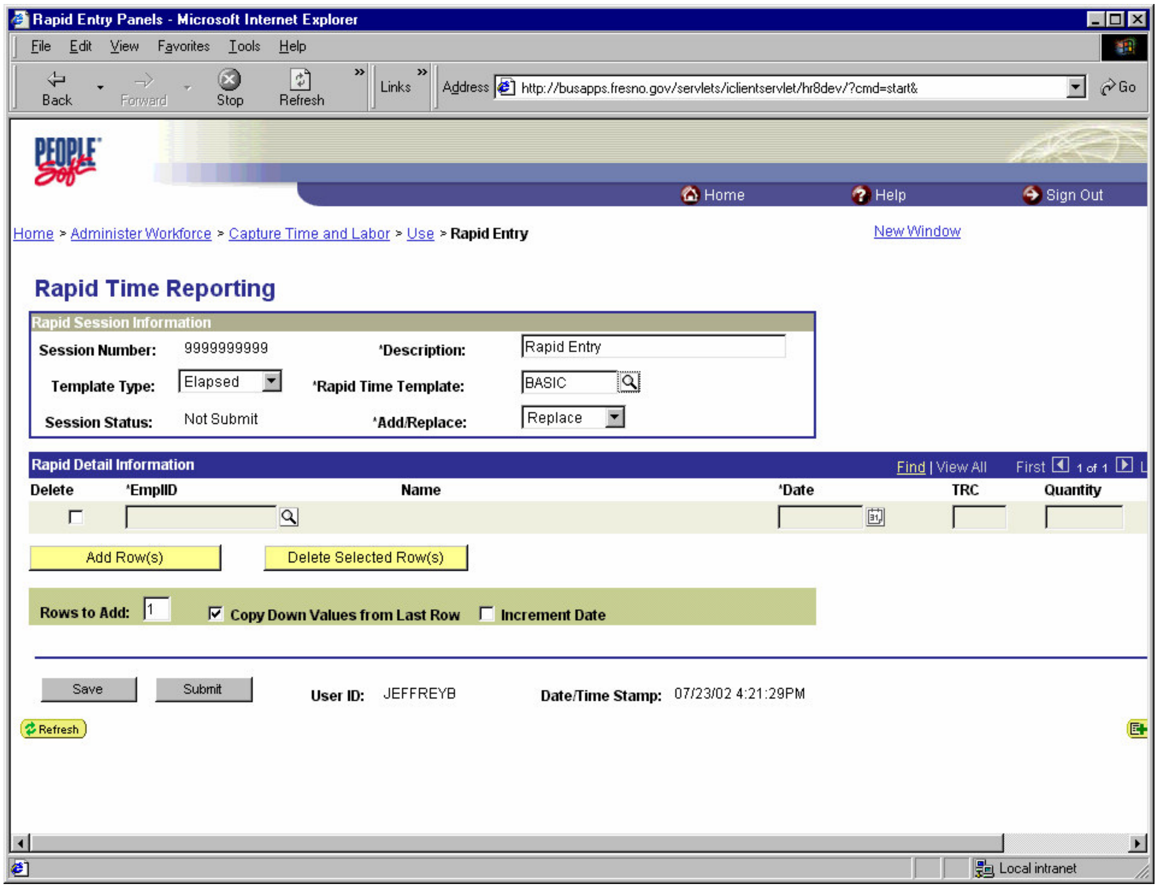
From Monday 08/18/2003 to Sunday 08/24/2003

Mon 8/18	Tue 8/19	Wed 8/20	Thu 8/21	Fri 8/22	Sat 8/23	Sun 8/24	Short Description	More...	Delete
0.000	0.000	0.000	0.000	0.000	0.000	0.000		More...	Delete

Add a New Line   Apply Schedule   Apply Rules   Previous Week   Next Week
Save
Return to Search

Rapid Entry

The Rapid Entry panel allows line by line data entry for employees in a format that is adaptable to the needs of individual users. A session is built that can be saved and appended to later, or submitted to Time and Labor. Navigate to: Administer Workforce > Capture Time and Labor > Use > Rapid Entry. Choose Add to create a new session.



The Template Type options are Elapsed or Punch. Reported Elapsed time counts the number of hours worked, regardless of beginning and ending time. Punch time is adapted for use of time clocks, and tracks beginning and ending times, as well as break and meal times. The Rapid Time Template allows selection of customized data entry templates. The time reporting fields can be included or excluded as needed by the users. The Add/Replace field allows the user to select whether this session will append to the time already reported in T&L, or delete and replace existing time.

The Rapid Detail Information section includes functions for adding one or many lines with the options of copying data from the previous line and incrementing the date.

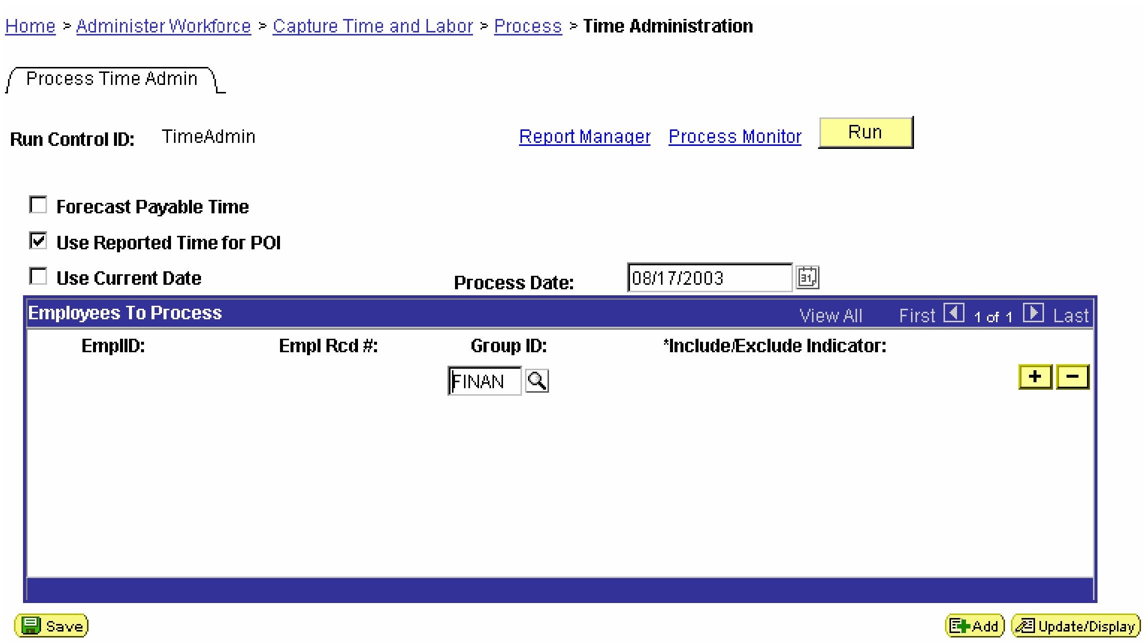
After a session is saved, it can be submitted to Time and Labor, or re-opened and modified.

Time and Labor processes

Time Administration

After time is posted to employees using any of the methods discussed above, the Time Administration process must be run for all employees. This process runs all appropriate rules (injury pay rules, comp time adjustments, etc), and edits the posted time for errors such as invalid TRCs, or insufficient leave balances.

To navigate to the Time Administration panel, select: Home > Administer Workforce. Capture Time and Labor > Process > Time Administration.



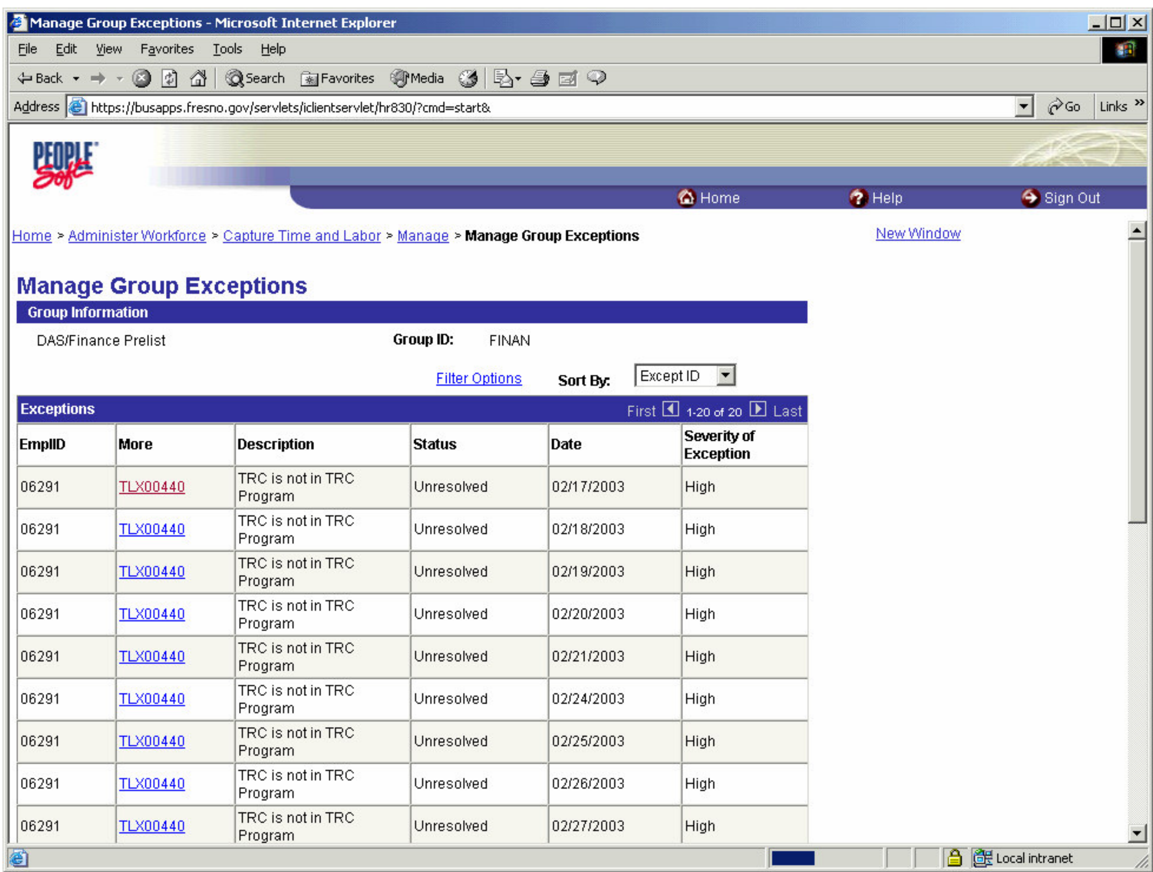
Select the box for 'Use Reported Time for POI (Period of Interest)'. This will select the range of dates to process for each employee based on what time has been reported for them for this pay period. Input the current Pay Period ending date in 'Process Date.' Time Administration may be run for an employee, a list of employees, or a Time and Labor group. Click 'Save' and 'Run.' You can click the link for Process Monitor to verify when the process is complete.

Manage Exceptions

When Time Administration creates exceptions for reported time, (e.g. invalid TRC, insufficient leave balance) these exceptions must be corrected and cleared before the time can be approved and pass through to payroll.   Exceptions can be viewed by Time and Labor group, or by Employee

After Time Administration is run, access the Manage Group Exceptions page by navigating: Home > Administer Workforce > Capture Time and Labor > Manage > Manage Group Exceptions.

Access exceptions by employee by navigating: Home > Administer Workforce > Capture Time and Labor > Manage > Manage Exceptions. Each link in the 'More' column will bring up a page with additional details about the error message. Exceptions can be generated because of errors in Time and Labor setup tables, or individual daily time reporting errors. The appropriate correction must be made and Time Administration re-run to clear the exception.



EmplID	More	Description	Status	Date	Severity of Exception
06291	TLX00440	TRC is not in TRC Program	Unresolved	02/17/2003	High
06291	TLX00440	TRC is not in TRC Program	Unresolved	02/18/2003	High
06291	TLX00440	TRC is not in TRC Program	Unresolved	02/19/2003	High
06291	TLX00440	TRC is not in TRC Program	Unresolved	02/20/2003	High
06291	TLX00440	TRC is not in TRC Program	Unresolved	02/21/2003	High
06291	TLX00440	TRC is not in TRC Program	Unresolved	02/24/2003	High
06291	TLX00440	TRC is not in TRC Program	Unresolved	02/25/2003	High
06291	TLX00440	TRC is not in TRC Program	Unresolved	02/26/2003	High
06291	TLX00440	TRC is not in TRC Program	Unresolved	02/27/2003	High

Approve Time

After the Time Administration process is complete, time must be approved before it can be paid. This process allows review of all posted time and approval, either by individual or group. To navigate to the Approve Time panel: Home > Administer Workforce > Capture Time and Labor > Manage > Approve Time by Group (Employee). Enter the group name or employee id, the range of dates you want to approve, and click 'Search.'

Home > Administer Workforce > Capture Time and Labor > Manage > **Approve Time by Group**

Approve Time by Group

Find an Existing Value

Group ID: FINAN

Start Date: 080403

End Date: 081703

Search Clear Basic Search

Home > Administer Workforce > Capture Time and Labor > Manage > **Approve Time by Group** New Window

Approve Payable Time (Group)

Approve Payable Time for a Group

Group Information

Group ID: FINAN DAS/Finance Prelist

Payable Time From 08/04/2003 To 08/17/2003 View All First 1-10 of 38 Last

Approve	Approval Status	Name	Job Code Description	Actual Hours	Total Hours	More ..
☐	Needs Approval	Dave,Urvashi K	Account Clerk II	80.000000	80.000000	More ..
☐	Needs Approval	Pullem,Theresa S	Executive Secretary	80.000000	80.000000	More ..
☐	Needs Approval	Bell,Margaret A	Accountant-Auditor II	80.000000	80.000000	More ..
☐	Needs Approval	Simpson,John A	Accountant-Auditor II	80.000000	80.000000	More ..
☐	Needs Approval	Minney,Mary Jane	Senior Accountant-Auditor	80.000000	80.000000	More ..
☐	Needs Approval	Wiles,Gregory S	Treasury Officer	80.000000	80.000000	More ..
☐	Needs Approval	Arellano,Yvonne M	Accountant-Auditor II	80.000000	80.000000	More ..
☐	Needs Approval	Balekian,Frank H	Accountant-Auditor II	80.000000	80.000000	More ..
☐	Needs Approval	Webster,Larry R	Accounting Technician	80.000000	80.000000	More ..
☐	Needs Approval	Weaver,Jeanne A	Principal Accountant	80.000000	80.000000	More ..

Approve All

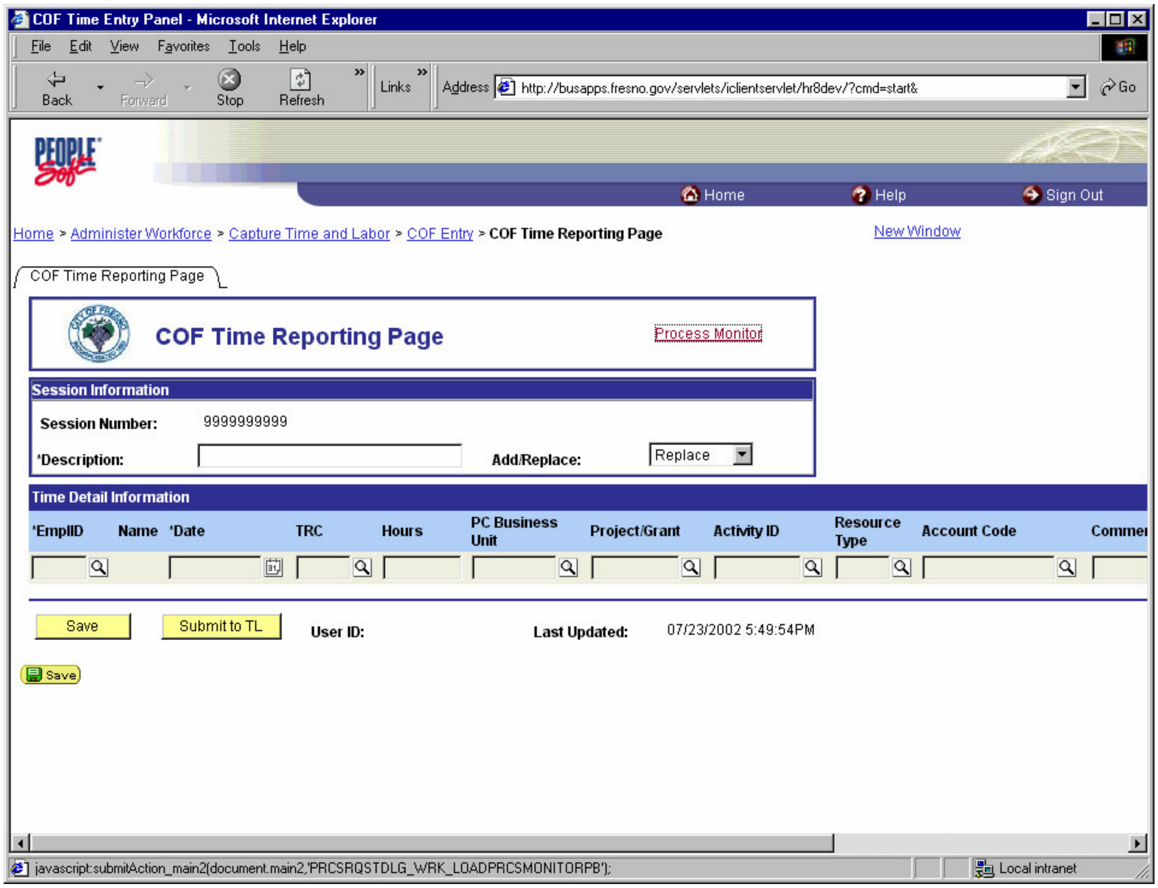
Save

COF customizations

There are three time reporting panels that have been developed by our programmers that provide additional functionality.

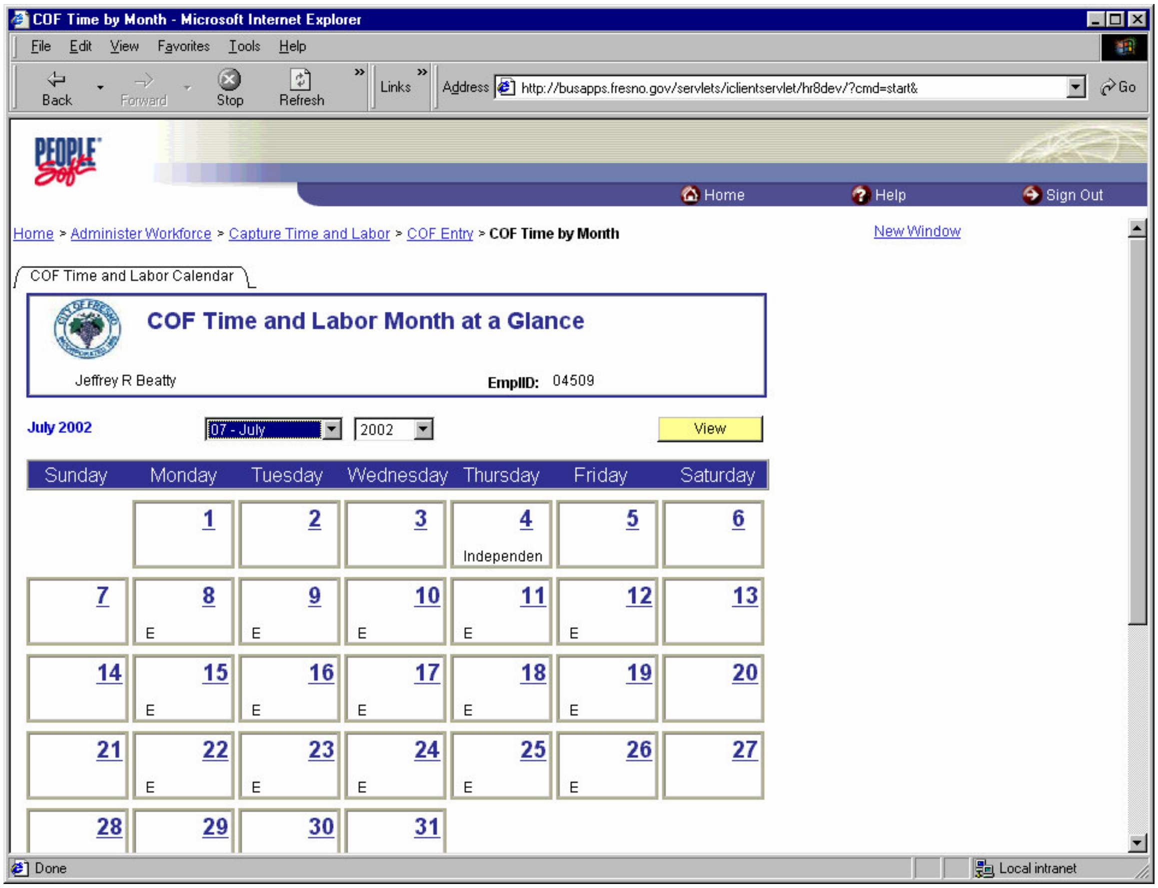
COF Time Reporting Page

This page is a variation of the Rapid Entry page with all the task entry fields arranged sequentially. Users can tab from field to field and enter data using only the keyboard, or the keyboard and mouse in combination. The last field is an 'Add' button that can be activated with the Enter key.



COF Time by Month

This page is similar to the Employee Time by Month page we are familiar with in version 7.51. Clicking on each day will take you to the daily time reporting page for data entry or modification. Within the limits of space, the TRC and hours reported for each day are displayed on the Month at a Glance calendar.



COF Employee Time Entry

This data entry format allows reporting time for one employee and a number of days or for one day for a number of employees. Choose the search criteria that is appropriate, then use the add lines function, or the next in list function to move between days or employees.